

## Request for Proposals

### **Comprehensive Library Management System**

PROJECT NO. R99R5200941



**Issue Date: April 19, 2005**

#### **NOTICE**

Prospective Offerors who have received this document from the Department of Budget and Management's web site or eMarylandMarketplace.com, or who have received this document from a source other than the Procurement Officer, and who wish to assure receipt of any changes or additional materials related to this RFP, should immediately contact the Procurement Officer and provide their name and mailing address so that amendments to the RFP or other communications can be sent to them.

**Minority Business Enterprises are Encouraged to Respond to this Solicitation**

**STATE OF MARYLAND  
NOTICE TO OFFERORS/CONTRACTORS**

In order to help us improve the quality of State proposals solicitations, and to make our procurement process more responsive and business friendly, we ask that you take a few minutes and provide comments and suggestions regarding the enclosed solicitation. Please return your comments with your proposals. If you have chosen not to bid on this Contract, please fax this completed form to: 410-974-3274 to the attention of Gisela Blades.

**Title: Comprehensive Library Management System**  
**Project No: R99R5200941**

1. If you have responded with a "no bid", please indicate the reason(s) below:

- ☐ Other commitments preclude our participation at this time.
- ☐ The subject of the solicitation is not something we ordinarily provide.
- ☐ We are inexperienced in the work/commodities required.
- ☐ Specifications are unclear, too restrictive, etc. (Explain in REMARKS section.)
- ☐ The scope of work is beyond our present capacity.
- ☐ Doing business with Maryland Government is simply too complicated. (Explain in REMARKS section.)
- ☐ We cannot be competitive. (Explain in REMARKS section.)
- ☐ Time allotted for completion of the bid/proposals is insufficient.
- ☐ Start-up time is insufficient.
- ☐ Bonding/Insurance requirements are restrictive. (Explain in REMARKS section.)
- ☐ Bid/Proposals requirements (other than specifications) are unreasonable or too risky. (Explain in REMARKS section.)
- ☐ MBE requirements. (Explain in REMARKS section.)
- ☐ Prior State of Maryland Contract experience was unprofitable or otherwise unsatisfactory. (Explain in REMARKS section.)
- ☐ Payment schedule too slow.
- ☐ Other: \_\_\_\_\_

2. If you have submitted a bid or proposal, but wish to offer suggestions or express concerns, please use the Remarks section below. (Use reverse or attach additional pages as needed.)

REMARKS:

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Offeror Name: \_\_\_\_\_ Date: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

Address: \_\_\_\_\_

# **KEY INFORMATION SUMMARY SHEET**

## **STATE OF MARYLAND**

### **Request for Proposals**

#### **COMPREHENSIVE LIBRARY MANAGEMENT SYSTEM**

#### **PROJECT NUMBER R99R5200941**

**RFP Issue Date:** April 19, 2005

**RFP Issuing Office:** Department of Budget and Management for  
Maryland School for the Deaf

**Procurement Officer:** Gisela Blades  
Office Phone: (410) 260- 7678  
Fax: (410) 974-3274  
e-mail: gblades@dbm.state.md.us

**Proposals are to be sent to:** Maryland Department of Budget and Management  
45 Calvert Street, Room 119  
Annapolis, MD 21401  
Attention: Gisela Blades

**Pre-Proposal Conference:** A pre-proposal conference will be schedule April 26, 2005 at  
10:00 a.m. at 101 Clarke Place, Frederick, Maryland 21705

**Closing Date and Time:** May 20, 2005 - 2:00 PM Local Time

### **NOTE**

Prospective Offerors who have received this document from the Department of Budget and Management's web site or eMarylandMarketplace.com, or who have received this document from a source other than the Procurement Officer, and who wish to assure receipt of any changes or additional materials related to this RFP, should immediately contact the Procurement Officer and provide their name and mailing address so that amendments to the RFP or other communications can be sent to them.

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## SECTION 1 - GENERAL INFORMATION

### 1.1 Summary Statement

- 1.1.1 The Maryland School for the Deaf seeks a Contractor to provide a Comprehensive Library Management System, i.e. a full service retrospective conversion from the current shelf list. The State intends to award one contract to one single vendor.
- 1.1.2 It is the State's intention to obtain services, as specified in this RFP, from a Contract between the successful Offeror and the State. The State does, however, reserve the right to procure goods and services from other sources when it is in the best interest of the State to do so.

### 1.2 Abbreviations and Definitions

For purposes of this RFP, the following abbreviations or terms have the meanings indicated below:

- a. **After Hours** – The time period outside of Normal State business hours (8:00 a.m. – 5:00 p.m. Monday through Friday except State Holidays). Any work outside Normal State business hours is identified as after hours.
- b. **COMAR** – Code of Maryland Regulations, available on-line at [www.dsd.state.md.us](http://www.dsd.state.md.us)
- c. **Contract** – The contract entered into between the State and the selected Offeror responding to this RFP. The Contract will include all general State terms and conditions, and will incorporate the entire RFP, including any addenda, and all or indicated portions of the selected Offeror's proposal. A sample contract is included as Attachment A to this RFP.
- d. **Contract Manager (CM)** – The State's designated person as the single point-of-contact with the authority and knowledge to issue work order and to resolve all matters in connection with the project. See Section 1.6 for the designated State Contract Manager.
- e. **Contractor** – The Offeror selected to receive the Contract award under the procedures contained in this RFP.
- f. **Fully Loaded** – A type of Labor Rate that includes all profit, and any direct and indirect costs of the Contractor. The indirect costs shall include among other things, all costs that would normally be considered General and Administrative costs and/or routine travel costs, or which in any way are allocated by the Contractor against direct labor hours as a means of calculating profit or recouping costs.
- g. **Local Time** – Time in the Eastern Time Zone as observed by the State.
- h. **MSD** - Maryland School for the Deaf , also referred to as "State" and "Agency"
- i. **Notice To Proceed (NTP)** – A formal notification issued by the Contract Manager that: (1) directs the Contractor to perform work, and (2) as of a date contained in the NTP, to begin performance of the work.
- j. **Offeror** – An entity that submits a Proposal in response to this RFP.

- k. **Procurement Officer** – The State’s representative responsible for this RFP, for the determination of scope issues in the resulting contract, and the only State representative that can authorize changes to the contract. See Section 1.5 for the designated State Procurement Officer.
- l. **Proposal** - The technical and financial response provide by Offerors in response to this RFP.
- m. **Request for Proposals (RFP)** – This Request for Proposals for the Maryland School for the Deaf, Project Number R99R5200941, dated April 19, 2005 including any amendments.
- n. **State** – The State of Maryland.
- o. **State Business Hours** – 8:00 A.M. to 5:00 P.M., local time, Monday through Friday, excluding State holidays.

### **1.3 Contract Type**

The contract that results from this RFP will be an Definite Quantity-Fixed Unit Price contract as defined in COMAR 21.06.03.05 and .06.

### **1.4 Contract Duration**

The Contract resulting from this RFP shall have two phases: Phase One shall represent a three (3) month period to complete the full service retrospective conversion, installation and training. Upon acceptance of software product, Phase Two representing software support shall commence and will be for two (2) years from date of acceptance. The State, at its sole option, shall have the unilateral right to extend the software support Contract for three (3) additional successive one-year terms.

### **1.5 Procurement Officer**

The sole point of contact in the State for purposes of this RFP prior to the award of any Contract is the Procurement Officer at the address listed below:

Gisela Blades  
Maryland Department of Budget and Management  
Division of Policy Analysis  
For the Maryland School for the Deaf  
45 Calvert Street, Room 119  
Annapolis, Maryland 21401  
Phone Number: 410-260-7678  
Fax Number: 410-974-3274  
E-mail: gblades@dbm.state.md.us

The State may change the Procurement Officer at any time by written notice to the Contractor.

### **1.6 Contract Manager**

The Contract Manager monitors the daily activities of the Contract and provides technical guidance to the Contractor. The State Contract Manager is:

Joseph Anthony  
101 Clarke Place  
Post Office Box 250  
Frederick, MD 21705  
301-360-2016

The State may change the State Contract Manager at any time by written notice to the Contractor.

### **1.7 Pre-Proposal Conference**

A pre-proposal conference (Conference) will be held on April 26, 2005 1:00 PM at the Maryland School for the Deaf – Frederick Campus located at 101 Clarke Place, Frederick, Maryland 21705.

### **1.8 Use of “e-Maryland Marketplace”**

“e-Maryland Marketplace” is an electronic commerce system administered by the Maryland Department of General Services. In addition to using the DBM web site ([www.dbm.maryland.gov](http://www.dbm.maryland.gov)) and other means for transmitting the RFP and associated materials, the solicitation and minutes of the pre-bid/proposal conference, Offeror questions and the Procurement Officer’s responses, addenda, and other solicitation related information will be provided via e-Maryland Marketplace.

This means that all such information is immediately available to subscribers to e-Maryland Marketplace. Because of the instant access afforded by e-Maryland Marketplace, it is recommended that all Offerors interested in doing business with Maryland State agencies subscribe to e-Maryland Marketplace.

### **1.9 Questions**

The Procurement Officer will accept written questions from prospective Offerors. Questions may be submitted by mail, facsimile, or preferably, by e-mail to the Procurement Officer and should be submitted in a timely manner prior to the proposal due to the Procurement Officer. Time permitting answers to all substantive questions that have not previously been answered, and are not clearly specific only to the requestor, will be distributed to all vendors who are known to have received a copy of the RFP. In addition, such substantive questions and answers will be posted on the DBM website ([www.dbm.maryland.gov](http://www.dbm.maryland.gov), see Procurements section).

### **1.10 Proposals Due (Closing) Date**

An unbound original and six (6) bound copies of each proposal (technical and financial) must be received by the Procurement Officer, at the address listed in Section 1.6, no later than 2:00 PM (local time) on May 20 2:00 PM in order to be considered. An electronic version (diskette or CD) of the Technical Proposal in MS Word format must be enclosed with the original technical proposal. An electronic version (diskette or CD) of the Financial Proposal in MS Word format must be enclosed with the original financial proposal. All diskettes must be labeled with the RFP title, RFP number, and Offeror name and packaged with the original copy of the appropriate proposal (technical or financial).

Requests for extension of this date or time will not be granted. Offerors mailing proposals should allow sufficient mail delivery time to ensure timely receipt by the Procurement Officer. Except as provided in COMAR 21.05.03.02, proposals received by the Procurement Officer after the due date, on May 20, 2005 at 2:00 PM (local time) will not be considered.

Proposals may not be submitted by e-mail or facsimile.



### **1.11 Duration of Offer**

Proposals submitted in response to this RFP are irrevocable for 120 days following the closing date of proposals or of Best and Final Offers (BAFOs), if requested. This period may be extended at the Procurement Officer's request only with the Offeror's written agreement.

### **1.12 Revisions to the RFP**

If it becomes necessary to revise this RFP before the due date for proposals, amendments will be provided to all prospective Offerors who were sent this RFP or otherwise are known by the Procurement Officer to have obtained this RFP. In addition, amendments to the RFP will be posted on the DBM Procurements web page and through e-Maryland-marketplace. Amendments made after the due date for proposals will be sent only to those Offerors who submitted a timely proposal.

Acknowledgment of the receipt of all amendments to this RFP issued before the proposal due date must accompany the Offeror's proposal in the Transmittal Letter accompanying the Technical Proposal submittal. Acknowledgement of the receipt of amendments to the RFP issued after the proposal due date shall be in the manner specified in the amendment notice. Failure to acknowledge receipt of amendments does not relieve the Offeror from complying with all terms of any such amendment.

### **1.13 Cancellations; Discussions**

The State reserves the right to cancel this RFP, accept or reject any and all proposals, in whole or in part, received in response to this RFP, to waive or permit cure of minor irregularities, and to conduct discussions with all qualified or potentially qualified Offerors in any manner necessary to serve the best interests of the State of Maryland. The State also reserves the right, in its sole discretion, to award a Contract based upon the written proposals received without prior discussions or negotiations.

### **1.14 Oral Presentation**

Offerors will be required to make oral presentations to State representatives. Significant representations made by an Offeror during the oral presentation must be reduced to writing. All such representations will become part of the Offeror's proposal and are binding if the Contract is awarded. The Procurement Officer will notify Offeror's of the time and place of oral presentations. Typically oral presentations occur approximately 2 weeks after the proposal due date.

### **1.15 Incurred Expenses**

The State will not be responsible for any costs incurred by an Offeror in preparing and submitting a proposal, in making an oral presentation, in providing a demonstration, or in performing any other activities relative to this solicitation.

### **1.16 Economy of Preparation**

Proposals should be prepared simply and economically, providing a straightforward, concise description of the Offeror's proposals to meet the requirements of this RFP.

### **1.17 Protests/Disputes**

Any protest or dispute related respectively to this solicitation or the resulting Contract shall be subject to the provisions of COMAR 21.10 (Administrative and Civil Remedies).

### **1.18 Multiple or Alternative Proposals**

Neither multiple nor alternate proposals will be accepted.

### **1.19 Access to Public Records Act Notice**

An Offeror should give specific attention to the clear identification of those portions of its proposal that it considers confidential, proprietary commercial information or trade secrets, and provide justification why such materials, upon request, should not be disclosed by the State under the Access to Public Records Act, Title 10, Subtitle 6, of the State Government Article of the Annotated Code of Maryland.

Offerors are advised that, upon request for this information from a third party, the Procurement Officer is required to make an independent determination whether the information can be disclosed (see COMAR 21.05.08.01).

### **1.20 Offeror Responsibilities**

The selected Offeror shall be responsible for all products and services required by this RFP. All Subcontractors shall be identified and a complete description of their role relative to the proposals must be included in the Offeror's proposals. Additional information regarding MBE subcontractors is provided under paragraph 1.27 below. If an Offeror that seeks to perform or provide the services required by this RFP is subsidiary of another entity, all information submitted by the Offeror, such as but not limited to, references and financial reports, shall pertain exclusively to the Offeror, unless the parent organization will guarantee the performance of the subsidiary. If applicable, the Offeror's proposal must contain an explicit statement that the parent organization will guarantee the performance of the subsidiary.

### **1.21 Mandatory Contractual Terms**

By submitting an offer in response to this RFP, an Offeror, if selected for award, shall be deemed to have accepted the terms of this RFP and the Contract, attached as Attachment A. Any exceptions to this RFP or the Contract must be clearly identified in the Executive Summary of the technical proposal. A proposal that takes exception to these terms may be rejected.

### **1.22 Proposal Affidavit**

A proposal submitted by an Offeror must be accompanied by a completed Bid/Proposal Affidavit. A copy of this Affidavit is included as Attachment B of this RFP.

### **1.23 Contract Affidavit**

All Offerors are advised that if a Contract is awarded as a result of this solicitation, the successful Offeror will be required to complete a Contract Affidavit. A copy of this Affidavit is included for informational purposes as Attachment C of this RFP. This Affidavit must be provided within five (5) business days notification of proposed Contract award.

### **1.24 Arrearages**

By submitting a response to this solicitation, each Offeror represents that it is not in arrears in the payment of any obligations due and owing the State of Maryland, including the payment of taxes and employee benefits, and that it shall not become so in arrears during the term of the Contract if selected for Contract award.

### **1.25 Procurement Method**

This Contract will be awarded in accordance with the competitive sealed proposals process under COMAR 21.05.03.

### **1.26 Verification of Registration and Tax Payment**

Before a corporation can do business in the State of Maryland it must be registered with the Department of Assessments and Taxation, State Office Building, Room 803, 301 West Preston Street, Baltimore, Maryland 21201. It is strongly recommended that any potential Offeror complete registration prior to the due date for receipt of proposals. An Offeror's failure to complete registration with the Department of Assessments and Taxation may disqualify an otherwise successful Offeror from final consideration and recommendation for Contract award.

### **1.27 Minority Business Enterprise Subcontract Participation Goal**

**NOTICE: The procedure for submitting MBE information and forms has been revised effective October 1, 2004. See Attachment D for explanation of the revised requirements. Questions or concerns regarding the MBE requirements of this solicitation must be raised before the receipt of initial proposals.**

An MBE subcontractor participation goal of 25% has been established for this solicitation. The Contractor shall structure its awards of subcontracts under the contract in a good faith effort to achieve the MBE goals in such subcontract awards with businesses certified by the State of Maryland as minority owned and controlled. MBE requirements are specified in Attachment D of this RFP. MBE participation in work performed under this contract will be monitored by the State. See Attachment D for details.

A current directory of MBEs is available through the Maryland State Department of Transportation, Office of Minority Business Enterprise, P. O. Box 8755, B.W.I. Airport, Maryland 21240-0755. The phone number is 410-865-1269.

The directory is also available at <http://www.mdot.state.md.us>. Select the MBE Program label at the left side of the web site, half way down. The most current and up-to-date information on MBEs is available via this web site.

### **1.28 False Statements**

Offerors are advised that section 11-205.1 of the State Finance and Procurement Article of the Annotated Code of Maryland provides as follows:

- A. In connection with a procurement contract a person may not willfully:
  - 1. Falsify, conceal, or suppress a material fact by any scheme or device;
  - 2. Make a false or fraudulent statement or representation of a material fact; or

3. Use a false writing or document that contains a false or fraudulent statement or entry of a material fact.
- B. A person may not aid or conspire with another person to commit an act under subsection (a) of this section.
- C. A person who violates any provision of this section is guilty of a felony and on conviction is subject to a fine not exceeding \$20,000 or imprisonment not exceeding five (5) years or both.

#### **1.29 Non-Visual Access**

The Contractor shall ensure compliance in any applicable support to the State of Maryland IT Non-Visual Access Standards. The standards should be incorporated to the fullest extent possible for Information Technology. These standards/policies may be revised from time to time and the Contractor shall comply with all such revisions. The Non-visual Access Clause noted in COMAR 21.05.08.05 and referenced in this solicitation is the basis for the standards that have been incorporated into the Maryland regulations. See COMAR 17.06.02. for the official regulation. Attachment G is a synopsis of the standards.

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## SECTION 2 – STATEMENT OF WORK

### 2.1 Introduction

- 2.1.1 The Maryland School for the Deaf provides excellence in education to prepare students to be contributing citizens. The automation of the schools libraries will create parity with public, school and university libraries. Students will have the opportunity to develop research skills that will transfer to public and academic library settings. This project will streamline the current process and allow Librarians more time to focus on instruction. This project will also give the school better control of the library materials and allow easier access to those materials.
- 2.1.2 With this goal in mind, the Maryland School for the Deaf seeks an experienced Contractor to provide a Web-enabled Comprehensive Library Management System that meets the business needs and functional requirements as described in the Statement of Work. Technical and business support is to include, but not be limited to: the acquisition of Commercial Off-the Shelf (COTS) software and hardware (as needed); any software customization for setup; identification and conversion of the present shelf list items, requirements validation and subsequent implementation, training, and maintenance.

### 2.2 IT Background Information

Current Platforms:  
Windows 2000/XP  
Windows Server 2003 for Web Hosting  
TCP/IP protocol  
Access Terminals are 17 inch:

Software:  
Windows platforms  
Microsoft Active Directory  
Firewall: Checkpoint

### 2.3 General Technical and Contract Requirements

**The Comprehensive Library Management System will be set up and managed at the site location of: 101 Clarke Place Frederick, Maryland 21705.**

- 2.3.1 The Contractor shall ensure all necessary technical and business support to include, but not be limited to: the acquisition of software and hardware; any software customization for setup, identification and conversion of the present shelf list items, training and the implementation and maintenance of a Web-enabled Comprehensive Library Management System:
- 2.3.2 **Performance Criteria:** The final system implementation must meet performance criteria to ensure success. The Contractor shall ensure that all support to any of the 'system' and components put into place meet documented specifications and standards and shall have to pass performance testing criteria and be approved by the State in order to be in compliance with the contract. Performance criteria and its testing criteria shall be documented to the State and have prior approval by the State with State approved work plans prior to any procurement or

implementation. Any work or procurement that does not have prior State written approval shall not be accepted nor paid for by the State under the contract, nor be a basis for claim to the contract. The Contractor shall perform at risk if there is any work, or work product performed without prior written approval of the State Contract Manager. See Sections 2.14.1.2.D. regarding Documentation of Performance Criteria and 2.14.1.3 regarding End-To-End Performance Testing.

**2.3.3 Compatibility:** The Contractor shall ensure that any and all of their support including all the hardware and software components that make up the system, maintain full compatibility with all interfacing systems, security systems, and telecommunications. The Contractor shall ensure that any and all of their support does not compromise system (system level or component level) compatibility. The Contractor will be fully responsible for all compatibility issues.

**2.3.4 Conversion of Present Shelf List Items:** The Contractor shall ensure the technical and business support to identify and provide for the conversion, subsequent testing and troubleshooting of the current shelf list items. There are approximately 26,000 items to be included in the conversion. The Contractor shall provide for the smart barcodes for those items. The Contractor shall ensure that the completed installation of the new system includes all converted items, and that the Performance criteria testing period will provide for the reliability of this conversion.

**2.3.5 Acceptance of deliverables:**

2.3.5.1. The deliverables will be submitted to the State Contract Manager for review and acceptance. The Contractor will continue to make revisions until accepted by the State Contract Manager. At the point of acceptance the State Contract Manager will sign approval document and return to the Contractor.

2.3.5.2. In the event of deliverable rejection, the Contractor will correct any deficiencies or non-conformities and resubmit the rejected item to meet the required deadline. If the Contractor fails to correct the problem within a maximum of five business days of notification of the failure by the State, follow-on project items may not continue until deliverable is satisfied, or State Contract Manager acceptance or waiver for the condition associated with non-acceptance.

**2.3.6 Materials:** Any materials (e.g. equipment or miscellaneous hardware, peripherals, or software) bought as a result of this contract shall be included in the price proposal. The existing servers at the School are expected to be used in the deliverables of this contract, but are not dedicated servers and are used for other school application. Should there be a need for additional material, not listed and included in this RFP as it exists, any material costs incurred by the Contractor will be billed on a pass-through basis, with prior written approval by the State CM, and shall not include any direct or indirect charges for profit or other charges by the Contractor. Documentation associated with any material invoice shall be an original invoice of the Contractor's supplier's invoice detailing the material cost, signed and dated by the Contractor. Material costs shall not include travel, per diem or similar costs incurred by the Contractor.

**2.3.7 Ownership of the Hardware and Software:** The State shall completely own all software and hardware bought as a result of this Contract.

- 2.3.7.1** “Software Source Code and Documentation” means all design tools, documents and diagrams used in the development of the source code to include, but not limited to, data flow diagrams, entity relationship diagrams, work flow diagrams, window layouts, report layouts, process flows, interface designs, logical and physical database design diagram, technical and user manuals, data dictionary, and a copy of the development software used to write and compile the source code. In general, the State shall completely own all software and hardware bought as a result of, and pursuant to, this Contract.
- 2.3.7.2** In the event of the contractor's voluntary or involuntary filing of bankruptcy or any other insolvency proceeding, contractor dissolution, contractor merger with acquisition by another company or contractor discontinuance of support of any software or system, the contractor shall convey to the State all rights, title, and interests in all software that comprises any solutions proposed as a part of the Contract, licenses, software source codes, and all associated Software Source Code Documentation. These rights include but are not limited to the rights to use, and cause others to use on behalf of the State, said software, licenses, software source codes, and Software Source Code Documentation.
- 2.3.7.3** Upon acceptance by the State of each software product that is a Commercial Off-The-Shelf product, or where previous Source Code exists for a solution and that is to be used, the contractor shall deliver two copies of each software source code and Software Source Code Documentation to an escrow agent located within Maryland that is acceptable to the State. The contractor shall enter into an escrow agreement Each software source code shall be stored on compact discs or other media designated by the State.
- 2.3.7.4** The State shall have the right to audit the software source code and corresponding Software Source Code Documentation for each software product that comprises the solution as represented by the Contractor. This audit shall be scheduled at any time that is convenient for all parties to be present, as required by the escrow agreement. The State shall be provided with software or other tools required to view all software source codes.
- 2.3.8 Software Escrow.** If the Contractor supplies existing software for which the Contractor or others have copyright/ownership rights, the Contractor must either provide the source code directly to the State in a form acceptable to the State or must place the source code in escrow with an escrow agent located in the State of Maryland. The source code must be in a format acceptable to the State. Two copies of the source code must be provided in a format approved by the State.
- 2.3.9 Security and Privacy:** The Contractor shall ensure the system and their support comply with and adhere to the Maryland State IT Security Policy and Standards. These policies may be revised from time to time and the Contractor shall comply with all such revisions. Updated and revised versions of the Maryland State IT Policy and Standards are available on-line.
- a) Security and Privacy are extremely important to the State of Maryland. All connectivity and the display and access to information shall be by appropriate secured technology.
  - b) For privacy, the Contractor shall have pre-approval from the Maryland School for the Deaf on the display of information and what information may or may not be captured and kept for use during any terminal or Internet session and after

termination. See Department of Budget & Management website for details. Select IT Security Policy and Standards:

- c) Go to URL: <http://www.dbm.maryland.gov>. Select **IT Security** and then select **IT Security Policies and Standards**.

## **2.4 System and Support Specific Functional and Technical Requirements**

The Contractor shall ensure that their support and the system fulfill but not be limited to the following functionality, and the functional technical and business process implementation requirements:

**2.4.1 Provide an entirely Web-based Comprehensive Library Management System within three months of the Notice To Proceed. The Notice To Proceed will be provided at the Contract's Kick-Off Meeting within two weeks of Contract award.**

**2.4.2 The Contractor shall submit a Draft Project Management Plan (PMP) with the technical proposal** The Contractor shall include in the PMP a subset plan for software support that will minimize costs to the State while providing complete support of the software system.

**2.4.3 Kick-Off Meeting:** The Contractor shall hold a kickoff meeting with representatives from the Maryland School for the Deaf and the Governor's Office of Information Technology to review the deliverables and answer questions. The Contractor shall provide minutes from this meeting with detailed deliverables and a schedule for development.

**2.4.4 Requirements Validation:** The Contractor shall allow for a period at the beginning of the contract where the requirements for the business and technical requirements of the software and hardware are validated by the State before proceeding further with any acquisition of software, hardware or the system implementation. This validation shall begin at the Contract Kick-off meeting.

- A) The Contractor shall provide a **Final PMP**. The final PMP is a living document and shall be updated as necessary and/or requested by the State throughout the life of the contract. This plan should **include a schematic of the systems architecture as well as a development plan** based on the system requirements outlined in the RFP's statement of work and the Contractor's validation of the requirements. The PMP shall include the **time line for development and all tasking**. Ample time for testing by the Systems end-users shall be a part of the time line for development. The PMP shall include a **Communications Plan** to denote organizational staffing and contact information to include emergency contact information. **This information shall be kept current.**
- B) The Contractor shall validate with the State all milestones and deliverables required for this implementation
- C) As part of the validation period, the Contractor shall provide a short period of requirements validation, and the Contractor shall validate and document all hardware, software, tools, and supplies that are necessary. Once MSD approves the development plan, the Contractor shall complete the development of the Comprehensive Library Management System according to the approved Project Management Plan. The format and type of tool to be used for the Project Management Plan shall be pre-approved by the State Contract Manager.
- D) The Contractor, in collaboration with the State's stakeholders shall document the Performance Criteria the system and the Contractor's support shall be measured against during final performance testing, and the last end-to-end performance testing. (See Sections 2.3 Performance Criteria and Section 2.14.2 Performance Testing.)

**2.4.5 System Development Process In Collaboration with the State:**

After validating requirements at the beginning of the Contract, the validated requirements shall be presented to the State project team's stakeholders at a **Preliminary Design Review**. Any



necessary adjustments will be made and then the requirements will be validated at a final Critical Design Review. The Change Control Process will apply to these project procedures. Requirements shall be validated by the Contractor regarding each area of activity to include, but not be limited to the following phases: the procurement, logistics, development and testing, delivery, integration and testing, installation, setup, performance testing, implementation, end-to-end performance testing, training, documentation, warranty, maintenance, and supporting technical and business services for the system. All work and any associated deliverables shall be coordinated with the State's Project Manager and shall be documented in the Project Management Plan (PMP). The State of Maryland adheres to the State's System Life Cycle Development (SDLC) methodology. For methodology and format descriptions, see the URL at:

[http://www.dbm.maryland.gov/portal/server.pt?in\\_hi\\_space=SearchResult&in\\_hi\\_control=bannerstart&in\\_tx\\_query=sdlc](http://www.dbm.maryland.gov/portal/server.pt?in_hi_space=SearchResult&in_hi_control=bannerstart&in_tx_query=sdlc)

- A. **Implement the installation and conversion of the Comprehensive Library Management System on the MSD servers:** After the final PMP is approved by the State, the follow-on system development and implementation may begin; however each Milestone/Deliverable shall be approved per the Delivery Acceptance Criteria Process.
- B. **Conversion of Shelf List:** As part of the installation of the system, the Contractor shall install the finished system on the School's servers to include the full service Retrospective conversion from shelf list on the specified machines at the Maryland School for the Deaf. There are approximately 26,000 items to be included in the conversion. When the conversion happens the vendor is to provide the smart barcodes for those items (See No. 4 below). As noted previously, installation shall include testing and troubleshooting as needed.
- C. **Performance Period Testing and Warranty: The Contractor shall provide an End-to-End Performance testing that shall test all functionality and business processes.** A performance testing period will begin after all applicable deliverable products and services comprising the entire business process have been installed and all applicable deliverables have been accepted. The performance period will be for a period of the number of days established by the Contractor and approved by the State in the Requirements Validation period. The performance testing is to allow for adequate testing of all functionality by users, including any and all processes and interfaces. The time periods for any performance and warranty periods will be addressed in the Requirements Validation for the Performance Criteria.
  - 1) During any performance period, the MSD will test the functionality of the **system and services** to ensure that the requirements of the contract have been met. During the performance period, the **system and services** must perform at a level consistent with the performance criteria specifications. Any system and services must be available for unrestricted use by the MSD staff and other applicable users on an average effectiveness level of 98 percent or more for the given performance period. Availability for unrestricted use means that the system and services is accessible to users with full processing functionality. Effectiveness level refers to the system and services meeting the objectives listed below and the performance criteria measures as defined in the Requirements Validation period. Should MSD encounter performance problems or discover specifications have not been met by either the system or services, the Contractor shall rectify the performance problem or complete the specification to the MSD's satisfaction at no additional cost to MSD within two (2) weeks or as directed and approved by the DBM Project Manager.

- 2) The purpose of a Performance Period testing is to meet the following objectives:
  - a. Testing with existing system applications and services as appropriate;
  - b. Validate system set-up for transactions and user access;
  - c. Confirm use of system in performing business processes;
  - d. Verify performance of business critical functions;
  - e. Confirm integrity of business process, data, services, security, and end-products;
  - f. Verify all requirements of the Contract and have been met;
  - g. Speed of performance;
  - h. Rate of errors or failures;
  - i. Subjective satisfaction of the MSD Project Manager.
- 3) If it is determined that the scheduled Performance Period does not allow sufficient time for MSD to test all business processes (i.e. rounds, inspections, audits), then the Contractor shall warrant the system and services for an additional period guaranteeing that the system is free from performance problems and meets all specifications as defined in this RFP, and the follow-on Contract milestone and deliverables. Should MSD encounter performance problems or discover specifications have not been met, the Contractor shall rectify the performance problem or complete the specification to MSD's satisfaction at no cost to the School within two (2) weeks or as directed by MSD. Any warranty period shall begin upon (1) the conclusion of the Performance Period testing, and (2) system and services acceptance and signoff. Length of any warranty period will be decided at the beginning of the specified Performance Period testing and in the Requirements validation period. The length of the warranty will be based on when the applications are initially installed or upgraded, and business processes take place (i.e., rounds, inspections, audits).

#### **2.4.6 Hardware and Supplies to be provided by the Contractor:**

##### **A. Hardware / Peripherals**

- 1) Two (2) Stationary Laser Scanners with stands
- 2) Two (2) Handheld Inventory Scanners
- 3) Two (2) Receipt Printer
- 4) Two (2) Training Manuals specific to the Hardware/Peripherals

##### **B. Supplies**

- 1) Smart Barcodes not to exceed 26,000 with information obtained from the Retrospective Conversion from the shelf list.
- 2) 2,000 Dumb Barcodes
- 3) 5,000 Laser Spine Labels

**2.4.7 Training and Training Documentation:** The Contractor shall provide all training documentation.

2.4.7.1 The Contractor shall provide at least one hard copy and one electronic copy of the system documentation (See Documentation requirements in Attachment 'x').

2.4.7.2 The Contractor shall provide training to approximately 15 system users at the school located at 101 Clarke Place Frederick, Maryland 21705. The Contractor shall get prior approval from the State Contract Manager on all training activities to include but not be limited to all training times and activities.

2.4.7.3 The Contractor shall provide a minimum of sixteen (16) hours of training the Maryland School for the Deaf staff and its designees on the use of the Comprehensive Library Management System. Proper documentation of its operation will be required, as those trained will become the trainers.

2.4.8 The Contractor shall provide for the conversion(s) of all shelf items along with the smart Bar Code before full system implementation. All items shall be a part of the final performance period testing.

2.4.9 Technical and Business Maintenance Support: The Contractor shall provide technical and business maintenance support for the final Comprehensive Library Management System. This support shall include but not be limited to: License renewals, updates, patches, and Technical support Monday through Friday, **excluding State holidays (See the current list of holidays at the following URL:**

[http://www.dbm.maryland.gov/dbm\\_publishing/public\\_content/dbm\\_taxonomy/employee\\_services/state\\_holidays\\_for\\_the\\_year\\_2005.html](http://www.dbm.maryland.gov/dbm_publishing/public_content/dbm_taxonomy/employee_services/state_holidays_for_the_year_2005.html)

2.4.10 Support services must be provided by qualified personnel who are familiar with the Comprehensive Library Management System, its development, and the specifications of this RFP. The support plan shall include the following:

A) Two years of technical support to include the barcode readers and any application software and services provided under this contract. To start when MSD takes acceptance of the system.

B) The system shall have a comprehensive Users' Guide on-line with an index and sample screens.

1) The system shall have a fully functional demo with sample data.

2) The system shall have context sensitive on-line Help (in addition to the User's Guide).

3) The Contractor shall provide technical support for the system via the Internet through secured transmission

- for the system via e-mail.,
- 24/7 technical support availability for the system.
- 800 number for Technical Support for the system which is available Monday through Friday from 7:00 A.M. to 7:00 P.M. local time.
- **methods such as PC Anywhere is prohibited.**

2.4.11 **Comprehensive Library Management System Requirements:** The MD School for the Deaf IT staff that will act as System Administrator

The Contractor shall be responsible for all 'system' functionality. The Comprehensive Library Management System General Functions shall include but not be limited to the following:

- 2.4.11.1 The system must be a Windows based system with full Graphical User Interface designed to run on the Window 2000/XP. The system shall be accessible online, via the Internet Client. The system shall be housed at the MD School for the Deaf on one of its servers.
- 2.4.11.2 The system shall be a true 32 bit software application designed specifically for Windows platform operating system.
- 2.4.11.3 The system shall be entirely web-based and require no additional software.
- 2.4.11.4 The system shall allow for Windows search stations (OPAC).
- 2.4.11.5 The system shall run on a Windows Server 2003 network platform.
- 2.4.11.6 The system shall be fully United States Machine Readable Cataloging (USMARC) compatible.
- 2.4.11.7 The system shall be able to export MARC21 records on USMARC21 (LC MARC) format without additional software.
- 2.4.11.8 The network version shall be accessible by the number of licensed seats and OPAC on unlimited number of computers on the network.
- 2.4.11.9 The system shall allow every networked Windows workstation to be used simultaneously for searching (OPAC) and all other functions, including circulation.
- 2.4.11.10 Backup and Restore functions shall be included in the system.
- 2.4.11.11 The system shall have on-line help available everywhere in the system by pressing the F1 or Help tab. On-line help must be comprehensive, detailed and relevant to the function in use.
- 2.4.11.12 The system shall support Smart Barcodes and Dumb Barcodes.
- 2.4.11.13 The system shall allow the use to either use the touch screens, mouse or keyboard to move throughout the system.
- 2.4.11.14 The system shall be able to accept exported student information from an ASCII file in tab delimited, fixed length fields, or in quotes and comma delimited formats.
- 2.4.11.15 The system shall have an easy-to-use, high-level password security system that can be defined by the director of the library.
- 2.4.11.16 The system shall be multi-tasking, multi-threading and multi-windowing, i.e., print in the background, circulate materials, add students, etc. on the same terminal, without having to close out a function to perform another function.
- 2.4.11.17 The system shall allow your patrons to view and search your card catalog via the internet and your workers to do circulation via the internet at the schools library.
- 2.4.11.18 The system shall have a full range of standard reports as well as be able to produce customizable reports for all the various modules within the software.

- 2.4.11.19 The system shall also have password protection available to prevent unauthorized users from having access to certain modules such as patron registration and circulation. See the State of Maryland IT Security Policy and Standards (referred to in Section 2.13).
- A) The Comprehensive Library Management System shall be designed so that information is secure and that the confidentiality, integrity and availability of data is ensured.
  - B) System log-on shall be an authorized function reserved for those who have an appropriate login and password combination.
  - C) The system shall have password protection available to prevent unauthorized users from getting into certain functions such as indexing, inventory, and circulation menus.
  - D) The system shall allow authorized override by a supervisor during the circulation process when an authorized user has lesser permissions.
- 2.4.11.20 The system shall support major study programs, i.e., Accelerated Reader, Electronic Bookshelf, Scholastic's Reading Counts! Etc.
- 2.4.11.21 The system shall allow the library director to review all transactions pertaining to items, both online and in a reporting format approved by the State.
- 2.4.11.22 The system shall alert an operator when a copy of the software is already open and resident on the taskbar.
- 2.4.11.24 The Comprehensive Library Management System Specific Functions (Searching Features (OPAC), Circulation, Student Database, Catalog Database, Reports, Inventory, Internet, Training and Technical Support and Data Maintenance) shall include but not be limited to the following requirements. All features shall be included either in the base product or through the customization. The Contractor shall clearly indicate to the State staff which features require customization during requirements validation.:
- A) Search Features (OPAC):
    - A.1 The system shall be user friendly, both to novices and to experienced users, requiring minimal assistance from library personnel.
    - A.2. The system shall provide at least five levels of searching: a one-term simple search, a two- or three-term Boolean search, visual search, power search, and search by study programs.
    - A.3. The system shall allow for selective searching by author, title, subject, keyword and donor in the one-term simple search.
    - A.4. The system shall allow simultaneous searches on one or all networked stations.
    - A.5. The system shall allow for easy or complex searching.
    - A.6. The system shall compile and print bibliographies from one or more searches. Users should be able to name the bibliography as they wish.

- A.7. The system shall allow the user to add all search results to a bibliography in a single mouse click if desired.
- A.8. The system shall allow the user to review all items selected for a bibliography before printing it.
- A.9. The system shall allow students to define their search by author, title, subject, and keyword or a user-defined combination of any or all search types.
- A.10. The system shall allow for visual (picture based) searching, which may be configured by the library director.
- A.11. The system shall support forward and backward browsing without returning to a search list.
- A.12. The system shall support sorting results in ascending or descending order by various criteria.
- A.13. The system shall display results in summary form and in full card format and allow for book cover graphics.
- A.14. The system shall allow for wildcard searches with as few as just one character before the wildcard.
- A.15. The system shall allow for searching by donor information based upon the donor or the person(s) memorialized or otherwise honored by the gift.
- A.16. The system shall provide access to daily search activity statistics from each workstation.
- A.17. Librarians or other staff members shall be able to create topical searches and link them with icons to make searching even easier.
- A.18. The OPAC shall be configurable to allow students to access the Internet with the click of a button without having to exit the OPAC.
- A.19. The system shall display the number of occurrences of each author, title, subject, keyword, or key phrase, or donor that matches a search term.
- A.20. The user shall be able to see the number of hits before the actual search results are displayed or simultaneously with the display of the first screen of the results list.
- A.21. Once the full information for an entry on a search result list is displayed, a user should be able to perform a hyper search on an author's name or on a subject with its subdivisions when the name or subject is underlined indicating a hyperlink to the information.
- A.22. Patrons shall see holdings information for each title, including location, circulation status (with anticipated return date) and shelf status when the item is checked in.
- A.23. Patrons shall be able to see search results in card catalog format and in summary lists when more than one item satisfies the search criteria.

- A.24 The OPAC search summary screen should be configurable by the library director.
- A.25 The system shall provide an option for wildcard characters for truncation of words or headings and for substitution of characters.
- A.26 The system shall provide an option for wildcard character(s) for substitution of characters at the beginning, within or at the end of search criteria.
- A.27 The software shall have an optional module that allows anyone with Internet access to search the library's holdings and know the status of an item via the Internet.
- A.28 The system shall have online help built into the Internet OPAC to assist the students in completing successful item searches.
- A.29 The system shall have a way for the patrons to check their circulation status using a unique PIN number while on the Internet OPAC module.

**B. Circulation:**

- B.1 The system shall support check-in, check-out, reserves, renewals, paying or waiving fines and/or assessing other costs as necessary.
- B.2 The system shall support printing of receipts that include transactions related to check-in, check-out, reserves, renewals, paying or waiving fines.
- B.3 The system shall automatically blank the check-out window when no activity has occurred for a specified period of time.
- B.4 The system shall support right mouse-clicks providing quick access to menu options pertaining to circulation functions, i.e., payment of fines, removal of reserve status, adding pertinent messages about an item, adding pertinent messages to a patron record, editing the patron demographic data, etc.
- B.5 The system shall provide for assessment for damages, loss of an item, etc. from the check-out screen.
- B.6 The system shall allow an item to be marked lost concurrent with assessment of fine for loss of item.
- B.7 The system shall support right mouse-clicks providing quick access to menu options pertaining to sorting reports.
- B.8 The system shall allow the librarian/director to assign loan periods, grace periods, renewal options and fine amounts for various groups of students and types of items.
- B.9 The system shall calculate due dates, material fines, and circulation status based upon the profile established by an authorized operator.
- B.10 The system shall let authorized system operators reassign material due dates on a detailed 12-month calendar for multiple-years in advance.

- B.11 The system shall provide a worker profile plus login and password to prevent unauthorized entry into program functions and to define the permissions approved for authorized operators.
- B.12 The system shall enable circulation to be carried out simultaneously on any or all workstations on a network.
- B.13 The system shall indicate the number position in the queue for any item that a patron has requested reserved for him/her.
- B.14 The authorized operator shall be able to check items out to patrons, check items in, and identify student IDs using barcode readers or by manually entering numbers, complete names of patrons, or partial surnames or given names.
- B.15 The system shall allow for renewal of all items without having to scan or type each of the item numbers.
- B.16 The authorized operator shall be able to limit the cumulative number of items a patron may have on loan.
- B.17 The authorized operator shall be able to limit the number of items a patron may have on loan based upon circulation types.
- B.18 The system shall calculate due dates automatically according to the patron type and circulation class as established by an authorized operator.
- B.19 The authorized operator shall be able to look up a patron by the item number of any item checked out to the student.
- B.20 The system shall estimate fines for overdue items calculated according to due dates along with the patron type, item type, and circulation class as established by an authorized operator.
- B.21 The system shall allow authorized operators to reassign due dates for holidays and other days the library will be closed by using a pop-up calendar.
- B.22 The system shall allow authorized operators to prevent calculation of fines on specific holidays and other days the library will be closed.
- B.23 The system shall allow an authorized operator to know the estimated fines for an item or all items that are overdue for any student.
- B.24 When checking items out, an authorized operator shall be able to change the calculated due date necessary for the process.
- B.25 The system shall allow for supervisory override of circulation functions when other personnel have lesser permissions with respect to override of blocked functions.
- B.26 An authorized operator shall be able to change the due date by manually typing the new date, selecting dates from a pop-up calendar or by using key combinations.



- B.27 When changing due dates, operators shall have the option of changing the dates forward or backward as necessary for any item checked out to a patron.
- B.28 The system shall allow an operator to specify lost or damaged items.
- B.29 The system shall allow an operator to attach a specific message or messages to items as necessary. Such message(s) may be informative about the item or may instruct when the item is circulated, i.e. "Pages 21-28 missing" or "Requires deposit for circulation," etc.
- B.30 The system shall be able to reserve items, queue reserves, and remove reserves.
- B.31 The system shall allow an authorized operator to review a patron's record.
- B.32 The system shall allow an authorized operator to review a patron's history.
- B.33 The system shall be configurable so that review of a patron's history can be disabled when maintaining student privacy requires the removal of access to this feature.
- B.34 The system shall let authorized operators view a patron's entire record instantly, including details regarding outstanding loans, reserves, fines, and demographic data.
- B.35 The system shall be able to identify dynamically any patron's record with information missing in the record.
- B.36 The system shall allow authorized operators to browse patron names and ID numbers.
- B.37 The system shall automatically mark students as having delinquent status.
- B.38 The system shall allow authorized operators to place messages specific to a patron on his/her record.
- B.39 The system shall allow authorized operators to check the status of both items and patrons.
- B.40 The system shall assign fines automatically, but the use of fines should be optional.
- B.41 The system shall allow an authorized operator to accept full or partial payment of fines owed by patrons.
- B.42 The system shall allow an authorized operator to modify messages for both short-term and long overdue items and fine notices.
- B.43 The system shall be able to display the cost of an item when printing overdue lists and notices.
- B.44 The system shall print overdue notices at the branch level.
- B.45 The system shall be able to print:

- A) Lists and notices for overdue items;
  - B) Lists and notices for fines;
  - C) Patron activity report showing the number of items circulated to patrons;
  - D) Statistical reports for number of circulated items by classification report class;
  - E) Statistical reports for number of circulated items by patron groups.
- B.46. The system shall be able to keep the borrowers' profiles which shall include, but not be limited to demographic data (Name, Address, Telephone, etc.) and loan privileges (including loan periods for various types of materials, number of items which may be borrowed at one time, renewal options, etc.).
- B.47. The system shall be able to update loan periods for various types of materials.
- B.48. The system shall be able to charge and discharge library items.
- B.49. The system shall be able to record the check-out and return date of an item.
- B.50. The system shall be able to provide a renewal function.
- B.51. The system shall be able to allow notices to be sent by e-mail.
- B.52. The system shall allow patron records to be imported from external databases.
- B.53. The system shall allow remote, Bookmobile circulation via a laptop computer or PDA that has access to all of the library's data, i.e., current circulation, catalog, and patron data.

#### **C. Student Database:**

- C.1 The system shall allow manual input of student records with context sensitive helps for each data field.
- C.2 The system shall provide context sensitive helps for each patron data field.
- C.3. The system shall allow importing student data from administrative programs in a variety of formats, i.e., fixed length, tab-delimited, quotes and commas, etc.
- C.4 The system shall automatically detect and retrieve modified or added patron records.
- C.5 The system shall automatically detect duplicate entries of patron records.
- C.6. The system shall enable the librarian/director to review records for selective inspection of input by personnel authorized to add or modify patron records.
- C.7 The system shall permit export of patron information in ASCII format.

- C.8 The system shall provide for expiration of patron membership.
- C.9 The system shall provide alternate demographic information for patrons.

#### **D.4. Catalog Database:**

- D.1. The system shall allow for importing and exporting USMARC records.
- D.2 The system shall have the ability to catalog in an easy menu driven GUI, or traditional MARC cataloging
- D.3 The system shall be able to integrate directly with CD-ROM Cataloging Software and Internet Cataloging Software applications.
- D.4. The system shall automatically detect and retrieve modified or added catalog records.
- D.5 The system shall automatically detect duplicate entries of catalog records.
- D.6 The system shall allow adding an additional copy of an item with a single mouse click followed by acceptance of the master record and any edits necessary to describe the location of the additional copy.
- D.7. The system shall be configurable to include automatic assignment of Item ID numbers to new records.
- D.8 The system shall be configurable with respect to the format of call numbers and subject headings, i.e., upper case or mixed case as preferred.
- D.9 The system shall provide a cataloging feature, which allows the librarian/director to enter items without having to understand all the details of cataloging of MARC records.
- D.10 The system shall provide for easy entry of bibliographic information displayed in information areas such as core information, analytical data, additional information, multi-media information, reading programs, etc.
- D.11 The system shall allow electronic copying of bibliographic information from selective fields from the previous bibliographic record.
- D.12 The system shall enable the librarian/director to specify criteria for automatic inspection of input by personnel authorized to add or modify bibliographic records.
- D.13 The system shall allow electronic copying of bibliographic information record by record when advantageous to the user.
- D.14 The system shall provide a feature to let the cataloger search fields in the cataloger screens for other entries in the database without leaving the cataloger screen.

- D.15 The system shall provide a feature that enables the librarian/director to track and approve/verify any changes, additions, or deletions to either the material or student databases.
- D.16 The system shall permit tracking of donor names and demographic data.
- D.17 The system shall permit tracking of a person or organization that places a memorial in honor of a person or program.
- D.18 The system shall permit use of Dewey Decimal Classification.
- D.19 The system shall import and maintain full MARC records using MicroLIF 1991 - present bibliographic protocol.
- D.20 The system shall be able to import MARC records from book jobbers, CD-ROMs, retrospective conversion services, and other MARC-based systems.
- D.21 The system shall have a seamless interface with eZcat (a cataloging module using the Z39.50 bibliographic interchange protocol).
- D.22 The system shall permit the operator to do original cataloging and create standard MARC records without having to understand all the details of MARC records.
- D.23 The system shall automatically enter the MARC record tags, fields, and punctuation.
- D.24 The system shall allow defaults to be set up so that little or no knowledge of MARC tag numbers is necessary.
- D.25 The system shall have field names that are meaningful and easy to understand to facilitate original cataloging.
- D.26 The system shall allow MARC tag numbers to be repeated as often as required
- D.27 The system shall allow local cataloging data specific to the library to be added individually to standard MARC records.
- D.28 The system shall allow local data, such as *format*, *location*, *source*, *target audience*, and *circulation class*, etc. to be automatically assigned to new records.
- D.29 The system shall easily record multiple holdings of one title.
- D.30 The system shall alert the user if the data being entered already exists in the collection.
- D.31 Authorized operators shall be able to catalog and import catalog records while students are searching the collection.
- D.32 The system shall export full USMARC records without additional costs or software.
- D.33 The system shall be able to export records for the whole collection or to limit those items exported by a particular location, format, call number range, date of entry, or other criteria as fits the needs of the library.

- D.34 The system shall automatically index keywords and phrases from the subject, author, title, summary, and notes fields of the MARC record.
- D.35 A standard *stop list* shall be part of the system. All words in the subject, author, title, summary, or notes fields, which are not present on the *stop list*, shall automatically generate keywords and dynamically index the terms so that they are immediately searchable.
- D.36 The system shall search full titles automatically.
- D.37 The system shall allow for marking an item as lost or found with a specialized cataloging dialog.
- D.38 The system shall be able to integrate with CD-ROM cataloging software and subsequently search by title, author, subject, ISBN, or LCCN.
- D.39 The system shall be able to integrate seamlessly with eZcat cataloging software and receive records searched by title, author, subject, ISBN, LCCN or any of 70+ other options provided in the Z39.50 bibliographic interchange protocol.
- D.40 The system shall permit authorized operators to delete individual records from a collection when no encumbrance is attached to the bibliographic record.
- D.41 The system shall automatically delete all keywords, titles, and key phrases associated with a catalog record when such a record is deleted.
- D.42 The system shall prevent unauthorized users, by use of a worker profile, from accessing the cataloging screen or entering cataloging data and performing other functions for which they do not have permission.
- D.43 The system shall print spine labels and catalog cards at no additional cost.
- D.44 The system shall permit electronic marking of printed cards and labels to avoid costly inadvertent duplication of such processes.
- D.45 The system shall support on-line maintenance of the bibliographic records.
- D.46 The system shall display on-line help screens and allow an operator to customize them.
- D.47 The system shall provide real-time update of the catalog indexes as records are added, edited, or deleted. Changes should be reflected immediately in all modules.
- D.48 The system shall capture all cataloging transactions for both audit and reporting purposes.
- D.49 The system shall support barcode scanning and printing spine call number labels in a format specified by the library.

**E. Reports: The following are a known list of reports. There may be other reports deemed necessary as part of the Contractor's solution. For this, and due to**

**the fact that some reports are statistical in nature versus just text, the Contractor shall ensure that their validation of requirements includes this area and there is enough time allocated to the definition of each required report. In addition to the reports themselves, the Contractor and State staff shall evaluate and understand the need to see items displayed a certain way with Graphical User Interface (GUI), have print capability in addition to showing the information on-line, and if what the user sees on-line is actually how the information should be printed. Reports shall be a part of the performance testing performed on the system and services.**

- E.1 The system shall be able to display and print circulation and cataloging statistics.
- E.2 The system shall be able to display and print standard circulation and cataloging reports.
- E.3 The system shall provide the librarian/director the ability to create customized reports that can be tailored to fit the librarian/director's needs.
- E.4 The system shall provide a variety of statistical reports as needed.
- E.5 The system shall maintain detailed information about each item in the library and an authorized user should be able to generate reports based on the information.
- E.6 The system shall let an authorized user select *any* field for display and/or printing any report.
- E.7 The system shall let an authorized user define multiple criteria with various operators to customize reports dynamically at any time.
- E.8 The system shall let an authorized user define as many criteria as necessary for compiling a subset of the catalog or student database. The criteria that can be specified shall be limited only by the number of lines of criteria dialog that can be displayed on the computer monitor.
- E.9 The system shall be able to print usage statistics. Reports may be prepared for daily, weekly, monthly, yearly or for other periods specified by the librarian/director. (*By branch location when applicable*)
- E.10 The system should print overdue notices at the branch level.
- E.11 The system should be able to create reports on:
  - A) Items on loan;
  - B) Items on reserve;
  - C) Overdue items;
  - D) Fines;
  - E) Messages about items;
  - F) Messages related to student records.

- E.12 The system shall be able to print a shelf list report in call number or a list in barcode number order.
- E.13 An authorized operator shall be able to customize reports to specify items by format, location, source, target audience, report class, acquisition date, or a combination of these and/or other criteria.
- E.14 The system shall print overdue, reserve and fine notices.
- E.15 Authorized operators shall be able to send reports to a printer, to a file, or to the screen.
- E.16 The operator shall be able to preview all reports on the screen before printing them.
- E.17 The system shall work with any popular dot-matrix, ink jet, or laser printer that has a Windows printer driver.
- E.18 The system shall allow reports to be printed across a network.

**F. Inventory:**

For solutions where financial accounting is performed by the system, or where the Contractor is responsible for asset management, the Contractor shall ensure that any financial accounting for fixed and capital assets which may be performed shall comply with Government Accounting Standards Board Statement No. 34 (GASB 34). For the applicable accounting principles see the URL :

<http://www.gasb.org/repmodel/index.html>

The Contractor shall assist with asset tagging for the State, inventory and record keeping as requested.

- F.1 The system shall allow for complete inventory of the collection as well as compute and print inventory reports (lost, missing, out-of-place materials, etc).
- F.2 The system shall allow the operator to perform inventory on all or part of the collection at one time.
- F.3 The operator shall be able to use either portable or non-portable barcode readers for inventory. Or, if desirable or necessary, the operator may use the keyboard for inventory.
- F.4 The system shall have the option of displaying the title, call number and the barcode during the inventory process.
- F.5 The system shall let authorized operators view inventory reports via both the screen and the printed page.
- F.6 The system shall allow change of location and/or change of circulation type during inventory, example: move to reserve shelf with circulation restricted to “in house only,” etc.
- F.7 The system shall print a list of all missing items during the inventory process.

F.8 The system shall display reports listing:

- A) The number of items in;
- B) The number of items on loan;
- C) The number of items lost;
- D) The number of items on reserve;
- E) The numbers of items in the catalog database.

**G Internet: All Internet activity and support shall be by secured transmission as outlined in the SOW. In addition, the Non-visual Access Standards as previously noted apply.**

G.1 The system shall integrate with an on-line catalog module for displaying the library database and cataloged URLs via the World Wide Web.

G.2 The system shall have the ability to function on a LAN or WAN that gives Internet access to basic library functions, i.e., cataloging, circulation, and student lookup.

#### **H. The following are required modules to be provided.**

The base implemented contract product(s) shall accommodate the hooks (examples: field place-holders, certain indexing, business and development rules, etc.) for these by maintaining open architecture and design features in its original development's customization preparation.

H.3.1 A required module shall allow students to search the local collection. Then, when they find an item with a URL in the 856u field of the MARC record, they shall be able to click on the URL and immediately go to that site on the Internet for more information about their topic.

H.3.2 The system shall have an optional module that allows anyone to search the library's holdings via the Internet.

H.3.3 A Z39.50 module shall provide authorized operators access to a pre-configured list of major libraries, including the Library of Congress, from which the operator can download MARC records.

H.3.4 A Z39.50 server module shall provide for connectivity between libraries specifically for sharing bibliographic records via the Internet.

## **2.5 Staffing Requirements**

### **2.5.1 Availability of Key Personnel.**

**Offeror shall propose and identify key personnel available to perform Contract requirements.**

Contractor key personnel shall not be reassigned to another task without written concurrence of the Contract Manager. If any key personnel leave the employment of the Contractor, or are approved for reassignment by the Contract Manager, the replacement must be approved by the State Contract Manager as outlined in Section 2.5.2

### **2.5.2 Substitution of Key Personnel.**



During the first 60 calendar days of the Contract performance period, no substitutions of key personnel will be permitted unless such substitutions are necessitated by extraordinary circumstances such as sudden illness, death, or as otherwise approved by the State Contract Manager. In any of these events, the Contractor shall promptly notify the State Contract Manager and provide the information required by Section 2.5.4. After the initial 180 calendar day period, all proposed substitutions of key personnel shall be submitted in writing, at least 15 business days in advance of the proposed substitution, to the State Contract Manager, with the information required in Section 2.5.4. The State Contract Manager must agree to the substitution in writing before such substitution shall become effective.

**2.5.3 Availability of Other Personnel.** Individuals assigned and accepted as personnel for the tasks within this Contract are expected to remain dedicated to the assigned tasks for the duration of the task. Substitutions will be allowed only when the State Contract Manager specifically agrees to the substitution in writing.

**2.5.4 Substitution of Other Personnel.**

- A. All proposed substitutes of personnel shall have the qualifications at least equal to that of the person initially proposed by the Contractor in their proposed solution that was evaluated and accepted by the State Contract Manager. The burden of illustrating this comparison shall be the Contractor's. The resumes of the initially assigned personnel shall become the minimum requirement for qualifications for the duration of the total Contract term. If one or more of the personnel are unavailable for work under this Contract for a continuous period exceeding 15 calendar days, the Contractor shall immediately notify the State Contract Manager and propose a replacement with personnel of equal or better qualifications within 15 calendar days of notification. All substitutions shall be made in accordance with this provision.
- B. All requests for substitutions must provide a detailed explanation of the circumstances necessitating the proposed substitution, a resume of the proposed substitute, and any other information requested by the State Contract Manager to make a determination as to the appropriateness of the proposed substitution. All proposed substitutes must have educational qualifications and work experience equal to or better than the resume initially proposed for key personnel; the burden of illustrating this comparison shall be the Contractor's.

Resumes shall be signed by all substituting individuals and their formal supervisor, and the official resume of the previous employee shall be provided for comparison purposes.

## **2.6 Invoicing**

2.6.1 The development of the Comprehensive Library Management System shall be done on a fixed-price basis. The Contractor may invoice the State for progress payments as follows:

(A) All payments for services are progress payments only. Contractor shall not be entitled to retain any payments unless the State accepts the Comprehensive Library Management System in accordance with this RFP.

(B) Progress payments shall be tied to tangible work has been performed that is at least as valuable to the State as the requested payment amount. The accomplishment of tangible work is not the same as merely accruing hours of effort expended and amounts paid for materials. Rather, it means the completion of work that can be reasonably quantified, and that would not have to be redone by the State or another contractor if, for any reason, the contract would terminate as of the end of the period for which the bill has been submitted. Examples of such tangible work include tests completed satisfactorily, records entered into a deliverable database, deliverable document sections completed, site surveys performed and documented, and documented interviews conducted with personnel that possess information or expertise essential to the task.

(C) The project development schedule and time line should clearly identify the deliverables with which progress payments will be associated and provide the valuation of each deliverable.

(D) In the event the State does not accept the Comprehensive Library Management System application and requests Contractor repay all or a portion of the progress payments made hereunder, upon receipt by the State of such payments, the State will return all deliverables associated with such payments to Contractor. All payments shall be made within 30 days of the receipt of a proper invoice.

(E) Any material invoices, as previously noted, can only be approved for cost. No additional fees or markups shall be allowed. All material invoices shall be signed and dated by the Contractor and the original suppliers invoice shall be submitted and attached along with the applicable invoice.

2.6.2 The Contractor will be compensated for the support services provided by the Contractor based upon Fixed Price. The Contractor **will not** be reimbursed for travel time or travel expenses

2.6.3 Invoices submitted without the required information will not be processed for payment until the Contractor provides the required information.

2.6.3.1 All invoices shall include the following information: Name and address of Maryland School for the Deaf, Contractor name, remittance address, federal taxpayer identification (or if owned by an individual his/her social security number), Invoice Period, Invoice Date, Invoice Number, Amount Due and the Purchase Order Number(s) being billed. A pre-authorized representative shall sign each invoice. Additional information may be required in the future.

2.6.4 Invoices will not be paid until after the associated deliverable is accepted by The Maryland School for the Deaf. Invoicing for the contract and its requirements shall occur promptly as required. Final invoicing for the contract and its requirements shall be received by the State no later than 60 days following the end-of the contract.

## **2.7 Reports and Meetings**

2.7.1 Planning Meetings. The Contractor shall be available to attend various planning meetings with Maryland School for the Deaf staff on an as needed basis. The Contract Manager or applicable designated personnel shall be available to attend these meetings

2.7.2 Monthly Status Reports and Meetings. A meeting with the State Contract Manager will be held each month to discuss the Project Status Report, Invoice Report, and other necessary issues. The Contract Manager or applicable designated personnel shall attend as well as other appropriate individuals shall attend this meeting. The State Contract Manager will notify the Contractor of the other appropriate individuals that shall attend. The Contractor shall furnish monthly reports to the State Contract Manager and other individuals as appropriate in hard copy and electronic version in Word in the Monthly Status Meetings. At a minimum, the State will require the following reports, provided monthly, by the **10<sup>th</sup> day** of the month for the previous month's activities, and containing both current and cumulative information:

**A.** Project Status Report. The Project Status Report shall at a minimum include for all open projects: project title, tasks completed, tasks to be completed.

**B. Minutes.** The Contractor shall provide reports or minutes summarizing discussion highlights and action items resulting from meetings and discussions about the status of projects **within one week of the meeting** to State Contract Manager.

**2.7.3 Additional Reporting:** The Contractor shall support any additional reporting or meeting requests of the State Contract Manager as required and requested by the State for legislative, auditing, other special reporting purposes, or emergency events at no additional cost to the State or this contract.

## **SECTION 3 – PROPOSAL FORMAT**

### **3.1 Two Part Submission**

Offerors shall submit proposals in two separate volumes:

- Volume I - TECHNICAL PROPOSAL
- Volume II - FINANCIAL PROPOSAL

### **3.2 Proposals**

Volume I-Technical Proposal shall be sealed separately from Volume II-Financial Proposal but submitted simultaneously to the Procurement Officer (address listed on Key Information Summary). An unbound original, so identified, and six (6) copies of each volume are to be submitted. An electronic version of both the Volume I- Technical Proposal in MS Word format and the Volume II- Financial Proposal in MS Excel format shall also be submitted with the unbound originals technical or financial volumes, as appropriate. Electronic media may be 3-1/2" diskette or CD and shall bear a label on the outside containing the RFP number and name, the name of the Offeror, and the volume number.

### **3.3 Submission**

Each Offeror is required to submit a separate sealed package for each "Volume", which is to be labeled Volume I-Technical Proposal and Volume II-Financial Proposal. Each sealed package shall bear the RFP title and number, name and address of the Offeror, the volume number (I or II), and the closing date and time for receipt of the proposals on the outside of the package.

All pages of both proposal volumes shall be consecutively numbered from beginning (Page 1) to end (Page "x").

### **3.4 Volume I – Technical Proposal**

#### **3.4.1 Transmittal Letter**

A transmittal letter shall accompany the Technical Proposal. The purpose of this letter is to transmit the proposal and acknowledge the receipt of any addenda. The transmittal letter should be brief and signed by an individual who is authorized to commit the Offeror to the services and requirements as stated in this RFP. See Offeror's Responsibilities in Section 1.20.

#### **3.4.2 Required Submissions to be Submitted by Offeror:**

- Completed Proposal Affidavit (Attachment B – with original of Technical Proposal only)
- Completed MBE forms – see Attachments D

#### **3.4.3 Format of Technical Proposal**

Technical Proposals shall be submitted in a separate sealed package labeled "Volume I - Technical Proposal" and shall bear the name and address of the Offeror, the name and number of the RFP and the closing date for

proposals on the outside of the package. Inside this package an unbound original, to be so labeled, three (3) copies and the electronic version shall be provided.

Section 2 of this RFP provides requirements and Section 3 provides reply instructions. The paragraphs in these RFP sections are numbered for ease of reference. In addition to the instructions below, the Offeror's Technical Proposals should be organized and numbered in the same order as this RFP. This proposal organization will allow State officials and the Evaluation Committee to "map" Offeror responses directly to RFP requirements by paragraph number.

The Technical Proposal shall include the following section in this order:

#### **3.4.4 Title and Table of Contents**

The Technical Proposal should begin with a title page bearing the name and address of the Offeror and the name and number of this RFP. A table of contents shall follow the title page for the Technical Proposal.

#### **3.4.5 Executive Summary**

The Offeror shall condense and highlight the contents of the Technical Proposal in a separate section titled "Executive Summary". The summary shall also identify any exceptions the Offeror has taken to the requirements of this RFP, the Contract (Attachment A), or any other attachments. **Exceptions to terms and conditions may result in having the proposal classified as not reasonably susceptible of being selected for award.**

#### **3.4.6 Offeror Experience and Capabilities**

Offerors shall include information on past experience with similar projects. Offerors shall describe how their organization can meet the qualifications of this RFP and shall include the following:

3.4.6.1 An overview of the Offeror's experience and capabilities rendering services similar to those included in this RFP. This description shall include:

- A. Corporate/organization size, length of time the organization has been providing the services, key business partners, and the number of employees dedicated to providing the services;
- B. A comprehensive description of the Offeror's experience in supplying the services requested by this RFP;
- C. A list of government entities and non-profit organizations that have been clients of this firm;
- D. List of active clients by gross annual sales.
- E. The Offeror must provide addresses of 3 similar websites that your firm has developed.

#### **3.4.7 Personnel**

The Offeror shall describe its personnel capabilities in compliance with Section 2. Resumes shall be provided for all personnel proposed for this RFP.

#### **3.4.8 Offeror Technical Response to RFP Requirements**

The Offeror shall address each major task and submit every required plan as part of the Technical Proposal and describe how the proposed services will meet the requirements as described in the RFP. If the State is seeking Offeror agreement to a requirement, the Offeror shall state agreement or disagreement. Any paragraph that responds to a work requirement shall include an explanation of how the work will be done.

#### **3.4.9 Economic Benefit Factors**

The Offeror shall describe the benefits that will accrue to the State of Maryland economy as a direct or indirect result of the Offeror's performance of the Contract resulting from this RFP. The Offeror will take into consideration the following elements. (Do not include any detail of the financial proposals with this technical information):

- A. The estimated percentage of Contract dollars to be recycled into Maryland's economy in support of the Contract, through the use of Maryland subcontractors, suppliers and joint venture partners. Offerors should be as specific as possible and provide a percentage breakdown of expenditures in this category.
- B. The estimated number and types of jobs for Maryland residents resulting from this Contract. Indicate job classifications, number of employees in each classification, and the aggregate Maryland payroll percentages to which the Contractor has committed at both prime and, if applicable, subcontract levels.
- C. Tax revenues to be generated for Maryland and its political subdivisions as a result of this Contract. Indicate tax category (sales tax, inventory taxes and estimated personal income taxes for new employees). Provide a forecast of the total tax revenues resulting from the Contract.
- D. The estimated percentage of subcontract dollars committed to Maryland small businesses and MBEs.

#### **3.4.10 Subcontractors**

Offerors shall identify subcontractors, if any, and a complete description of the role any subcontractors will have in the performance of the Contract. MBE subcontractors must be identified in accordance with Attachment D.

### **3.5 Volume II - Financial Proposal**

Under separate sealed cover from the Technical Proposal and clearly identified with the same information noted on the Technical Proposal, the Contractor shall submit an original unbound copy, three (3) copies, and an electronic version in MS Word of the Financial Proposal. The Financial Proposal shall contain all cost information in the format specified in Attachment E. Complete the cost sheets only as provided in the Price Proposal Instructions.

## SECTION 4 – EVALUATION CRITERIA AND SELECTION PROCEDURE

### 4.1 Evaluation Criteria

Evaluation of the proposals will be based on the criteria set forth below: The Contract resulting from this RFP will be awarded to the Offeror that is most advantageous to the State, considering price and the technical factors set forth herein. In making this determination, technical factors will receive greater weight than price.

### 4.2 Technical Criteria

**4.2.1 The criteria to be applied to each Technical Proposal are listed in descending order of importance:**

- Approach to satisfying the Work Requirements, Strategy and Plans
- Offeror Library Conversion Experience, other related Experience and Capabilities
- Personnel Proposed
- Economic Benefit Factors

### 4.3 Financial Criteria

All qualified Offerors will be ranked from the lowest to the highest price based on their total price proposed within the stated guidelines.

### 4.4 Reciprocal Preference

Although Maryland law does not authorize procuring agencies to favor resident Offerors in awarding procurement contracts, many other states do grant their resident businesses preferences over Maryland Contractors. Therefore, as described in COMAR 21.05.01.04, a resident business preference will be given if: a responsible Offeror whose headquarters, principal base of operations, or principal site that will primarily provide the services required under this RFP is in another state submits the most advantageous offer; the other state gives a preference to its residents through law, policy, or practice; and, the preference does not conflict with a Federal law or grant affecting the procurement Contract. The preference given shall be identical to the preference that the other state, through law, policy or practice gives to its residents.

### 4.5 Selection Procedures

#### 4.5.1 General Selection Process

The Contract will be awarded in accordance with the competitive sealed proposals process under Code of Maryland Regulations 21.05.03. The competitive sealed proposals method is based on discussions and revision of proposals during these discussions.

Accordingly, the State may hold discussions with all Offerors judged reasonably susceptible of being selected for award, or potentially so. However, the State also reserves the right to make an award without holding

discussions. In either case of holding discussions or not doing so, the State may determine an Offeror to be not responsible and/or an Offeror's proposal to be not reasonably susceptible of being selected for award, at any time after the initial closing date for receipt of proposals and the review of those proposals. If the State finds an Offeror to be not responsible and/or an Offeror's Technical Proposal to be not reasonably susceptible of being selected for award, an Offeror's financial proposal will be returned unopened.

#### **4.5.2 Selection Process Sequence**

4.5.2.1 The first step in the process will be an evaluation for technical merit. During this review oral presentations and discussions may be held. The purpose of such discussions will be to assure a full understanding of the State's requirements and the Offeror's ability to perform, and to facilitate arrival at a Contract that will be most advantageous to the State. For scheduling purposes, Offerors should be prepared to make an oral presentation and participate in discussions within two weeks of the delivery of proposals to the State. The Procurement Officer will contact Offerors when the schedule is set by the State.

4.5.2.2 Offerors must confirm in writing any substantive oral clarification of, or change in, their proposals made in the course of discussions. Any such written clarification or change then becomes part of the Offeror's proposal.

4.5.2.3 The financial proposal of each qualified Offeror will be evaluated separately from the technical evaluation. After a review of the financial proposals of qualified Offerors, the Procurement Officer may again conduct discussions to further evaluate the Offeror's entire proposal.

4.5.2.4 When in the best interest of the State, the Procurement Officer may permit Offerors who have submitted acceptable proposals to revise their initial proposals and submit, in writing, best and final offers (BAFOs).

#### **4.5.3 Award Determination**

Upon completion of all discussions and negotiations, reference checks, and site visits, if any, the Procurement Officer will recommend award of the Contract to the responsible Offeror(s) whose proposal is determined to be the most advantageous to the State considering technical evaluation factors and price factors as set forth in this RFP. In making the most advantageous Offeror determination, technical factors will be given greater weight than price factors.

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